

LAZIO READY TO RIDE NEW SPACE CHALLENGES



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SUMMARY

| | | |
|-----------|---|----|
| 1. | LAZIO'S AEROSPACE ECOSYSTEM | 2 |
| 2. | AEROSPACE IN LAZIO | 5 |
| 3. | LAZIO AEROSPACE TECHNOLOGY DISTRICT (DTA) | 8 |
| 4. | ESA BIC LAZIO | 11 |
| 5. | LAZIO COMPANIES AT 55TH INTERNATIONAL PARIS AIR SHOW | 13 |

LAZIO'S AEROSPACE ECOSYSTEM

Lazio's aerospace ecosystem constitutes a unique excellence in the Italian manufacturing sector, with industrial and research expertise covering the entire supply chain.

It is a heritage that was born at the beginning of the 20th century and has been consolidated thanks to the process of integration between national Research Institutions of international level, Universities, Incubators, Accelerators, Technology Parks, major world-accredited companies, SMEs and high value-added startups.

An ecosystem that attracts national and international investments, thanks especially to the activity of the Aerospace Technology District, which is fundamental for the competitiveness of the sector, for its ability to aggregate and develop synergies between research, universities and the world of production.

According to its Smart Specialization Strategy, Lazio Region is supporting the development of the aerospace industry with investments to enhance technological evolution together with digital, industry and New Space Economy players, to strengthen the competitiveness of small and medium-sized enterprises and to encourage the emergence of new innovative experiences.

And the local government, through Lazio Innova, is among the key players in establishing the National Aerospace Technology Cluster (CTNA) in order to compete at the European and national levels.

An achievement that stems from Lazio's ability to team up among aerospace supply chain players.

Growth and competitiveness are in fact the result of a shared strategy among all the living and propulsive forces of the territory.

Thanks also to these regional policy actions, Lazio is now strategically and competitively positioned within the key domains of European and national industrial policy.

This positioning is supported both by Italy's significant commitment to European Space Agency (ESA) programmes—being the third-largest contributor with €3.1 billion pledged at the 2022 ESA Ministerial Meeting—and by more than €2 billion allocated to the space sector through Italy's National Recovery and Resilience Plan (PNRR), funding the following areas: SatCom (€210 million) for secure satellite telecommunications; Earth Observation (€797 million, Iride programme) for environmental and climate monitoring; Smart Space Factory (€180 million) for advanced satellite and space technology manufacturing; and In-Orbit Economy (€300 million) for in-orbit services and the development of eco-sustainable thrusters for next-generation launch systems.

Lastly, it is worth noting that the Metropolitan City of Rome Capital has been officially designated as the European Space Capital for 2026.

In the next section of this catalogue, following a brief overview of Lazio's aerospace innovation ecosystem, we present 16 outstanding Startups and SMEs that were selected through a public competitive process to be hosted within the Lazio Region's institutional booth, showcasing the innovative potential of the regional aerospace supply chain at the International Paris Air Show Le Bourget - SIAE 2025.

AEROSPACE IN LAZIO

The aerospace vocation in Lazio dates back to the beginning of the XX century, the result of a propensity for research and innovation that has always distinguished our territory and that has made aerospace one of the leading sectors of regional economic development.

The aerospace ecosystem of Lazio is among the largest in Italy in terms of production and scientific representativeness since it includes about 300 companies including large companies and SMEs with 23.5 thousand employees in cutting-edge technologies and an annual turnover of over 5 billion euros with a significant part (almost 2 billion) destined for exports.

The strong interaction with 5 public Universities and numerous world renowned national Research and Innovation organizations is in fact one of the strengths of our ecosystem, a strength also perceived and appreciated by international companies, and which qualifies with greater value the attractiveness of Lazio for aerospace production.

PRODUCTION, RESEARCH AND INNOVATION

Aerospace is at the heart of Lazio's Smart Specialization Strategy (S3) 2021-2027, with targeted investments for the development of frontier technologies and the strengthening of the competitiveness of SMEs.

An ecosystem that aggregates large companies, SMEs, startups, universities and technology parks, attracting national and international investments.

The Lazio Aerospace Technology District and the National Aerospace Technology Cluster (CTNA) are at the heart of innovation and collaboration policies, making Lazio a strategic hub for European and global markets.

SECTORS OF EXCELLENCE

Lazio is the only Italian region where the whole New Space Economy industrial value chain and a large part of the aeronautical and airport supply chain are present, a peculiarity that creates a competitive advantage at national and international level. Among its companies, Lazio Aerospace sector includes internationally renowned companies of excellence in the construction of satellites, propulsion systems and launcher components for access to space (Ariane and Vega), satellite systems for Earth observation, navigation and communication, equipment systems and aerostructures, electronics, information technology, avionics, air traffic management and airport management services (MRO).

The Lazio aerospace value chain is characterized by a high concentration: 9% of the companies are large system integrators of national and international standing (“Tier 1” and “Tier 2”) which generate 85% of total revenues and employ 77% of workers, compounded by a vast group (91%) of level 2 suppliers (“Tier 3”) consisting mainly of SME subcontractors that provide electronic products and services, ICT for the development of systems and satellite applications for communication, Earth observation, satellite navigation, avionics and aeronautical and airport services.

RESEARCH AND INNOVATION CENTRES

The Lazio Region also hosts the Italian Space Agency (ASI) and in Frascati, near Rome, the European Space Agency (ESA) with the ESRIN laboratories (one of the six European centres of excellence for the exploitation of Earth observation missions, founded in 1966). It also hosts the Nation’s major research centres, including the National Research Centre (CNR), the National Institute for Nuclear Physics (INFN), the National Institute for Astrophysics (INAF), the National Institute of Geophysics and Vulcanology (INGV), the National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA), the Institute for Environmental Protection and Research (ISPRA), the Centro Sviluppo Materiali S.p.A. (CSM – Rina Group), the Satellite Remote Sensing Joint Force Centre and the Air Force Flight Experimental Division (RSV).

**LAZIO AEROSPACE
TECHNOLOGY
DISTRICT (DTA)**

KEY NUMBERS



23,000 Employees



300 + Companies
(Large, Medium and Small Enterprises)



2 BN Euro in Exports



5 BN Euro Annual Turnover



5 Leading Universities



12 University Departments



30 Post - Degree University Courses



10 National Research Centers



3,000 Researchers



1 ESA BIC Lazio Incubator

In 2004, the signing of the APQ6 between the Lazio Region, the Ministry of Economy and Finance and the Ministry of Education, University and Research, gave life to the DTA - Aerospace Technology District of Lazio, the first Italian Aerospace and Defence High-Tech District. Coordinated by Lazio Innova, an in-house company of the Lazio Region, the DTA pools together all the key players of the regional aerospace system for the following purposes:

- Fostering industrial research, training, technology transfer, and the launch of new business initiatives in line with the Smart Specialisation Strategy.
- Acknowledging a complex ecosystem that puts together large internationally relevant companies, small and medium-sized production facilities with high value-added service providers in the field of training, science and knowledge.
- Further stimulating a context that currently constitutes an internationally relevant asset, whose vocation dates back to the beginning of the last century, with the first initiatives that laid the grounds for Italy to become the third Country in the world, after USA and URSS, to put a satellite in orbit in 1964.
- Through the participation of the DTA - Aerospace Technology District of Lazio, the Lazio Region is one of the founding members of the CTNA - National Aerospace Technology Cluster, which aggregates all the key players in the national aerospace system.

MAIN STAKEHOLDERS IN DTA

RESEARCH AND INNOVATION CENTRES

ESA - ESRIN European Space Agency

ASI Italian Space Agency

SAPIENZA Università di Roma

Università degli Studi **Roma TRE**

Università degli Studi di Roma

TOR VERGATA

Università degli Studi della **TUSCIA**

Università degli Studi di **CASSINO**

e del **LAZIO MERIDIONALE**

CNR (National Research Center)

INFN (National Institute of Nuclear Physics)

ENEA (National Agency for New Technologies, Energy and Sustainable Economic Development)

ISPRA (National Institute for Environmental Protection and Research)

INGV (National Institute of Geophysics and Volcanology)

INAF (National Institute of Astrophysics)

ESA Business Incubation Centre Lazio - Spazio Attivo Roma Tecnopolo Galaxia - the Italian Aerospace Technology Transfer Hub

RSV (Air Force Flight Experimental Division)

CITS (Satellite Remote Sensing Joint Force Centre)

CORDIFESA (Former C4 Defense COMMAND)

RESMA (Department of Aeronautical Meteorology)

LARGE COMPANIES

LEONARDO

THALES ALENIA SPACE ITALIA

TELESPAZIO

AVIO

MBDA

E-GEOS

ELT GROUP

ENGINEERING

ALMAVIVA

ENAV

RINA

AEROPORTI DI ROMA

INTECS

SICAMB

AIRBUS ITALIA

BOEING ITALIA

NORTHROP GRUMMAN ITALIA

OHB ITALIA

RHEINMETALL ITALIA

LARIMART - LEONARDO GROUP

SPACELAB - ASI & AVIO JV

IDS - FINCANTIERI GROUP

ESA BIC LAZIO

ESA BIC Lazio is part of the **ESA GETWAY COMMERCIALITATION** network, the go-to place for innovative business ideas involving space in all areas of society and economy.

ESA GETWAY COMMERCIALITATION network's mission is to support entrepreneurs in Europe in the development of business using satellite applications and space technology. This includes both applying space technologies in non-space sectors (downstream applications) and introducing terrestrial technologies into the space industry (upstream applications).

The **ESA BIC Lazio programme** is promoted and co-financed by **Italian Space Agency**, European Space Agency Commercialization Gateway and **Lazio Region**.

Entrepreneurs and companies in the start-up phase can be hosted within **Lazio Innova's Spazio Attivo Roma Tecnopolo**.

The selected start-ups will have access to:

- **Funding:** up to €50,000 for prototyping, product/service development, and intellectual property protection
- **Mentorship:** personalized support from Lazio Innova tutors and mentors
- **Technical Assistance:** from qualified experts
- **Access to a European Network:** connections with other startups and partners across Europe
- **ESA Brand Credibility:** visibility and reputation from being part of the ESA Space Solutions initiative

INCUBATEES

ART OTF
Betadynamiq
CSHARK
EDY
Finis Terrae
Involve Space
MATHCLICK
Science & Technology Italy
Space 11
Spark
Plantiverse
IntelligEarth

STAKEHOLDERS

ASI - Italian Space Agency
AVIO
E-Geos
ENAC
ESA - ESRIN European Space Agency
Galaxia - the Italian Aerospace Technology Transfer Hub
SAPIENZA Università di Roma
STAM - ESA Technology Broker Italy
Telespazio
Thales Alenia Space Italia
Università degli Studi di Roma TOR VERGATA
Università degli Studi Roma TRE

**LAZIO
COMPANIES
AT 55TH
INTERNATIONAL
PARIS AIR SHOW**



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EMERGENCY EQUIPMENT, FLEXIBLE FUEL TANKS, SPACE

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Italian space company offering advanced Space Surveillance & Tracking (SST) via its proprietary CubeSat constellation, FALCO. Focused on LEO Space Situational Awareness, ARCA serves commercial and institutional clients with cutting-edge, sustainable, and autonomous SST solutions.



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The company plays a crucial role in the JSF Program through the production of Ground Support Equipment for the maintenance of the F-35's stealth surface features. Arescosmo is also a manufacturer of trajectory stabilizers, parachutes for various applications the Ex-oMars probe parachute and CBRN protective garments for the Italian Ministry of Defence.



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Italian aeronautical company established in Anagni (central Italy) in 2006, It is specialized in the design and production of composite structural (and non-structural) parts. Aviorec is mainly focused for production of helicopters parts but also operates in the Aviation, Aerospace, Nautical & Rail sectors.



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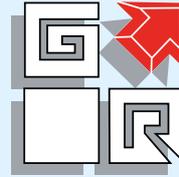
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Italian electronics and microelectronics design company, RAME provides space and ground segment solutions for RF & MW applications, as well as building blocks for IOT applications. Other fields of involvement concern ASIC & MMIC design, RF transceivers, AESA antennas and 5G.



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EXPLORE

**THE GEO-REFERENCED MAP OF MORE THAN
300 LAZIO AEROSPACE COMPANIES**



DOWNLOAD

**THE WHITE PAPER LAZIO AEROSPACE
INNOVATION ECOSYSTEM**



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